PATIENT FINANCIAL SERVICES SYSTEM (PFSS) – SURGERY

RELEASE NOTES

SR*3*144

Version 3.0
June 2006

Department of Veterans Affairs
VistA Health Systems Design & Development

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Introduction

Patch SR*3*144 is part of the Patient Financial Services System (PFSS) project. PFSS patches are being released on various schedules. PFSS will initially be implemented at select pilot sites ONLY.

Some of the PFSS software components are not operational until the PFSS On/Off Switch, distributed with patch IB*2*260, is set to "ON". The ability for the local site to set the switch to "ON" will be provided at the appropriate time with the release of a subsequent Integrated Billing patch.

The following are acronyms that are used in this document:

Acronym	Name
CPRS	Computerized Patient Record System
CPT	Current Procedural Terminology
ICD	International Classification of Diseases
PCE	Patient Care Encounter
PFSS	Patient Financial Services System

Overview of Project Enhancements

The software patch SR*3*144 provides the following enhancements:

- The Surgery software adds the ATTEND SURGEON (#.164) and PRINCIPAL PRE-OP DIAGNOSIS (#32) fields as required fields for creating a Surgery case.
- The Surgery software provides a new protocol that can be used once PFSS is activated to process specifically defined consults in the CONSULT package. This function will send pre-certification information related to the Surgery Consult. It does NOT create a Surgery case or store any of the consult or PFSS information in the Surgery files.

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Project Enhancements

This section describes the new features, as well as changes to existing functionality, that are included in the patch SR*3*144.

Required Fields for Creating a Surgery Case

The ATTEND SURGEON (#.164) and PRINCIPAL PRE-OP DIAGNOSIS (#32) fields are now required when entering data to create a Surgery case. The following options have been updated to require these fields:

- *Make Operation Requests* [SROOPREQ] option
- *Schedule Unrequested Operations* [SROSRES] option
- *Schedule Unrequested Concurrent Case* [SRSCHDC] option
- *Make a Request for Concurrent Cases* [SRSREQCC] option
- *Make a Request from the Waiting List* [SRSWREQ] option

Entering information at the “Principal Preoperative Diagnosis” prompt automatically populates the INDICATIONS FOR OPERATIONS field (#55), which can also be updated later. The “Indications For Operations” prompt is no longer displayed during case creation.

File and Field Updates

This section lists the field updates to the Surgery software.

SURGERY File (#130) Updates

The following fields in the SURGERY file (#130) are modified for data dictionary updates:

- DATE OF OPERATION (#.09)
- PFSS ACCOUNT REFERENCE (#500)

Consult Processing: Surgery Request Consult

IMPORTANT: Some VA Medical Centers use the Consults software to create a Surgery Request form and then manually create a Surgery case using the information on that consult form. If your site does not use that process, this enhancement does **not** require you to do so. The information in this section only pertains to you if you use the Consults software to create a Surgery Request Form.

This patch provides the ability to create a pre-certification for Surgery when a specific type of consult is created. The consult template must be designed to collect surgery request information and include the data elements required for IDX account creation and pre-certification.

This new function does not provide the ability to create a Surgery Request within the Surgery software when the consult is created. It does NOT create a Surgery case or store any information in the Surgery file. Its purpose is solely for pre-certification in IDX.

A Consult Surgery Request template can be used, and must require the following fields:

- PID
- Date of Operation
- Surgeon
- Attending Surgeon
- Local Surgical Specialty
- Principal Preoperative Diagnosis
- Principal Operative Procedure

A new mail group titled SR CONSULT is created in the MAIL GROUP file (#3.8). If the processing of the Surgery Request Consult is not successful, an alert notification will be sent to the SR CONSULT mail group. The notification will tell the VistA mail group that the processing has failed and that IDX must be manually updated for pre-certification to occur.

For more information about setting up the Consult Surgery Request template, see Appendix A: Guidelines for Surgical Request Creation.

Appendix A: Guidelines for Surgical Request Creation

The PFSS 1B Pilot Project provides the ability for Surgery insurance pre-certification if the Consults package is utilized to create a Surgery request. This new feature does NOT provide the additional functionality to have the consult request store information in the VistA Surgery package. To support pre-certification, specific information must be entered into the Surgery Request Consult. Sites using the Consults package for Surgery Requests will be required to create or modify existing Surgery Consults Request forms in the REQUEST SERVICES file (#123.5).

To use the new functionality, the following steps must be followed:

1. Set up the Consult Services for a Surgery Request
2. Set up a template in CPRS for the Surgery Request

The following sections demonstrate how to perform the setup necessary for a Surgery Request Consult.

Setting up the Consult Service for a Surgery Request

The following example displays the steps to follow when setting up a Consult Service for Surgery Request.

```
Select OPTION NAME: GMRC MGR       Consult Management
GMRC MGR       Consult Management

   RPT    Consult Tracking Reports ...
   SS     Set up Consult Services
   SU     Service User Management
   CS     Consult Service Tracking
   RX     Pharmacy TPN Consults
   GU     Group update of consult/procedure requests
   UA     Determine users' update authority
   UN     Determine if user is notification recipient
   NR     Determine notification recipients for a service
   TD     Test Default Reason for Request
   LH     List Consult Service Hierarchy
   PR     Setup procedures
   CP     Copy Prosthetics services
   DS     Duplicate Sub-Service
   IFC    IFC Management Menu ...
   TP     Print Test Page
```

```
Select Consult Management Option: SS Set up Consult Services
Select Service/Specialty:   SURGERY REQUEST
```

The Service Name must contain “SURGERY REQUEST”.

```
SERVICE NAME: SURGERY REQUEST// <Enter>
ABBREVIATED PRINT NAME (Optional): <Enter>
INTERNAL NAME: <Enter>
Select SYNONYM: <Enter>
SERVICE USAGE:  <Enter>
SERVICE PRINTER: <Enter>
```

```
NOTIFY SERVICE ON DC: <Enter>
REPRINT 513 ON DC: <Enter>
PREREQUISITE: <Enter>
  No existing text
  Edit? NO// <Enter>
PROVISIONAL DX PROMPT: <Enter>
PROVISIONAL DX INPUT: <Enter>
DEFAULT REASON FOR REQUEST:
  No existing text
  Edit? NO// YES
```

```
==========< DEFAULT REASON FOR REQUEST >==========

CONSULT CANNOT BE COMPLETED WITHOUT THE MINIMUM DATA ELEMENTS.

<=======T=======T=======T=======T=======T=======T=======T=======T
```

```
RESTRICT DEFAULT REASON EDIT:  <Enter>
```

Effectively locks CPRS template for no editing, which forces the required data elements to be entered)

Set up your service in any manner you want from here forward with teams, etc.)

```
Inter-facility information
IFC ROUTING SITE: <Enter>
IFC REMOTE NAME: <Enter>
Select IFC SENDING FACILITY: <Enter>
SERVICE INDIVIDUAL TO NOTIFY: <Enter>
Select SERVICE TEAM TO NOTIFY: <Enter>
Select NOTIFICATION BY PT LOCATION: <Enter>
PROCESS PARENTS FOR NOTIFS: <Enter>
Select UPDATE USERS W/O NOTIFICATIONS: <Enter>
Select UPDATE TEAMS W/O NOTIFICATIONS: <Enter>
Select UPDATE USER CLASS W/O NOTIFS: <Enter>
Select ADMINISTRATIVE UPDATE USER: <Enter>
Select ADMINISTRATIVE UPDATE TEAM: <Enter>
PROCESS PARENTS FOR UPDATES: <Enter>
SPECIAL UPDATES INDIVIDUAL: <Enter>
RESULT MGMT USER CLASS: <Enter>
UNRESTRICTED ACCESS: <Enter>
Select SUB-SERVICE/SPECIALTY: <Enter>
```

When you create a new service, it is not automatically linked into the Consults hierarchy. You must explicitly group each service under ALL SERVICES or under another service identified as a “GROUPER” that in turn is a SUB-SERVICE/SPECIALTY under ALL SERVICES.

Until this is done, the new service is not visible in the service hierarchy and cannot be selected for any action. The new service is identified in the “SUB-SERVICE/SPECIALTY” of the identified parent grouper.

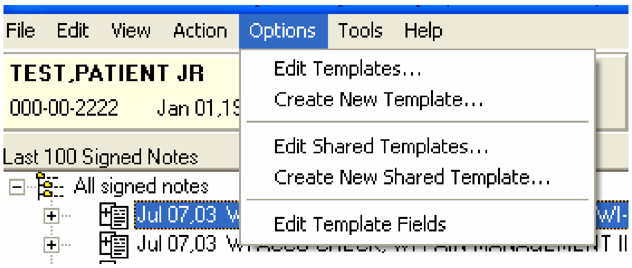
Example of Consult service hierarchy:

a) ALL SERVICES (Grouper Only) (This is the MEDICAL CENTER level grouper)
   b) PFSS SURGERY GR (Grouper Only) (This is a SERVICE level grouper)
      c) ***SURGERY REQUEST (***This is the new request/consult service)

Setting up a Template in CPRS for the Surgery Request

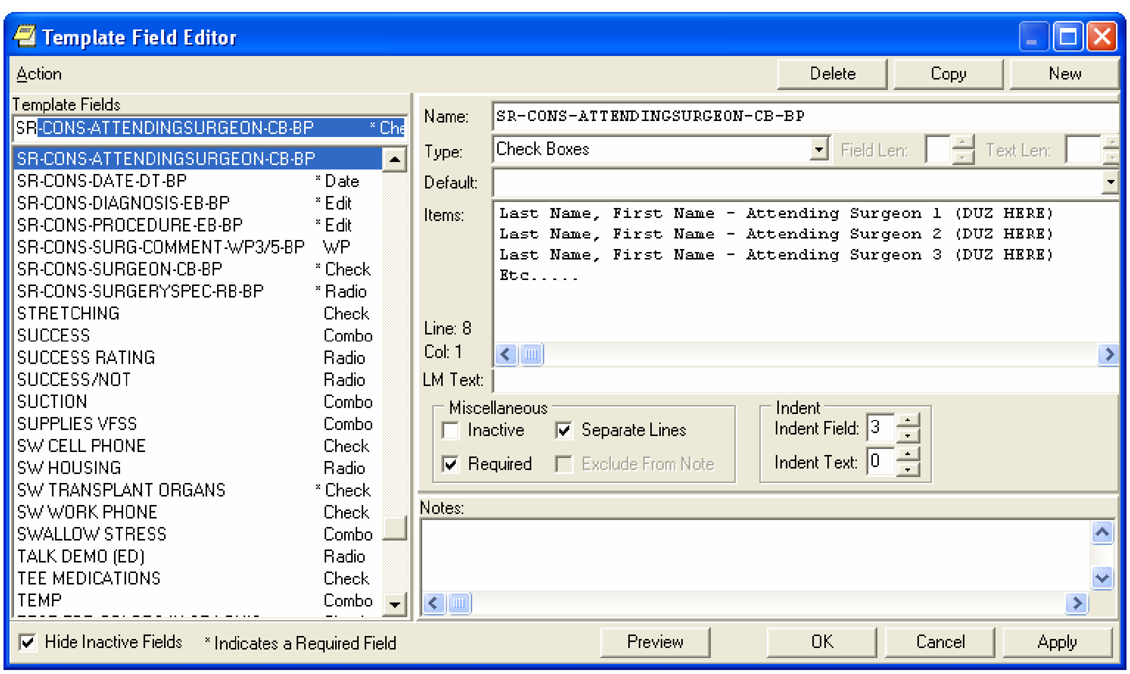
The following section explains how to set up a template in CPRS for the Surgery Request. All steps must be followed exactly for the Surgery Consult Request to work correctly.

1. Open CPRS.
2. Select the patient. In this example, the patient TEST,PATIENT JR is selected.
3. Click one of these tabs: **Notes**, **Consults**, or **D/C Summ**.
4. On the Options menu, click **Edit Template Fields**.



The Edit Template Fields option is enabled based on the Authorization Subscription Utility (ASU) user classes entered in the in the XPAR parameter TIU FIELD EDITOR CLASSES. This multi-valued parameter contains a list of ASU user classes and can be set at the User, Service, Division, and System levels. Users identified as members of an ASU “user class” (e.g., a Clinical Coordinator) are allowed to edit template fields. Others not in the identified user class will see the option as disabled.

The Template Field Editor window opens.

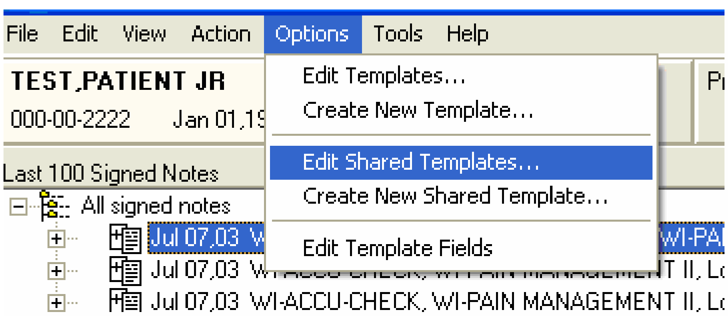


The template fields created above are utilized to create the CPRS Template.

5. In the Template Fields list, select the following minimally required fields:

   - PID – (Patient Name)
   - Date of Operation
   - Surgeon - (This element MUST match the entry in the NEW PERSON file(#200) exactly or the consult will generate an error)
   - Attending Surgeon - (This element MUST match the entry in the NEW PERSON file(#200) exactly or the consult will generate an error)
   - Local Surgical Specialty
   - Principal Preoperative Diagnosis
   - Principal Operative Procedure
   - Provisional Diagnosis

6. Click OK.
7. On the Options menu, click **Edit Shared Templates.**

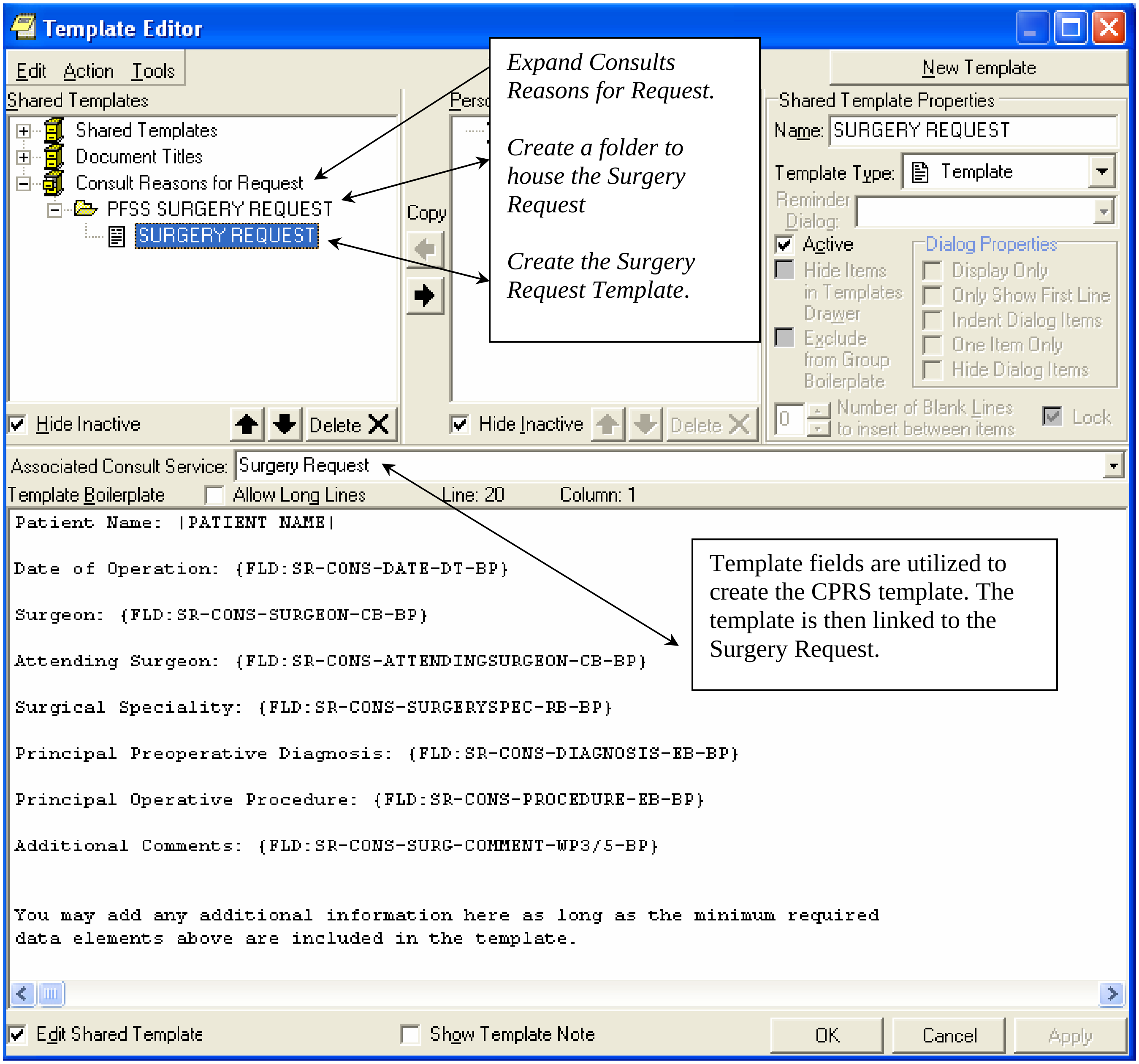


The following steps are guidelines. The hierarchy may be created to match your current template structure.

The Template Editor window opens.

8. From the Template Editor, select the template to which you wish to add a Template Field.
9. Insert the cursor at the place in the Template Boilerplate field where you wish to insert the Template Field.
10. Right-click in the template and select **Insert Template Field**.
11. On the Insert Template Field dialog, type the first few letters of the desired field or scroll through the list until the desired field is located.
12. Click the field you wish to insert.
13. Click **Insert Field**.
14. Repeat steps 11 through 13 for each additional Template Field you wish to insert.

15. Click **Done** when you have added all of the desired template fields.



16. Right-click in the template and select **Preview/Print Template**. This will preview the template. If the template does not display with the desired appearance, you may continue to edit it.

17. On the Template Editor dialog, click **OK** to save the changes to the template.

Appendix B: Surgery Request Consultation Error Mail Group

This appendix gives direction on how to create and/or populate the VistA mail group that will receive error messages when a Surgery Request Consult is entered for pre-certification, but does not contain the minimum required data elements to initiate a pre-certification.

The mail group creation will be exported with the Surgery patch SR*3*144. Each site will need to determine the local staff that should be added as members of this mail group to receive the mail bulletin so the required elements may be obtained for pre-certification.

In the event the mail group fails with patch installation, use the following instructions to manually set up the mail group.

```
XMEDITMG     Mail Group Edit
Select MAIL GROUP NAME: SR CONSULT
  Are you adding 'SR CONSULT' as
    a new MAIL GROUP? No// Y  (Yes)

MAIL GROUP NAME: SR CONSULT  Replace <Enter>

Select MEMBER: CPRSPROVIDER,ONE
```

Members of the mail group should be staff that will have access to correct the Surgery Request Consultation. Enter a local user who should receive mail addressed to this group; the user must have an access code and a mailbox.

```
DESCRIPTION:
  Edit? NO// YES

<==[WRAP ]==[ INSERT ]===< DESCRIPTION >=====[ <PF1>H=Help ]==== >

THIS MAIL GROUP IS INTENDED TO ALERT SURGERY PERSONNEL THAT A SURGERY REQUEST
CONSULTATION HAS BEEN ENTERED AND DOES NOT CONTAIN THE MINIMUM REQUIRED ELEMENTS TO
INITIATE A PRE-CERTIFICATION.

<=======T=======T=======T=======T=======T=======T=======T==>
```

```
TYPE: ?
       PU       Public
       PR       Private
```

At the “TYPE” prompt, enter the type, either Public or Private, for the mail group. The type of mail group determines who can send mail to it. Provided there are no AUTHORIZED SENDERS specified, anyone can send mail to a public group; only members of the mail group can send mail to a private group. If there are AUTHORIZED SENDERS specified, only those users can address the group.

```
TYPE: PU PRIVATE
RESTRICTIONS:
```

The RESTRICTIONS field is only applicable for PRIVATE mail groups. It is ignored for PUBLIC mail group. This field controls who may send messages to the PRIVATE mail group.

Set the value to **0** (zero) to set the mail group as UNRESTRICTED, meaning all members may address the group.

Set the value to **1** to set the mail group as ORGANIZER ONLY, meaning only the ORGANIZER may address the group. The group is then a personal group.

Non-members cannot address private mail groups.

```
RESTRICTIONS: 0 UNRESTRICTED
ORGANIZER:  CPRSPROVIDER,ONE
```

The ORGANIZER field is for the user who has the privileges of an “Organizer” for the mail group. For example, an organizer can add new members to a “Private” mail group.

```
COORDINATOR: CPRSPROVIDER,ONE
```

This field is used as a screen when a user tries to edit a mail group that he is a coordinator of. If the screen fails and the user does not hold the XMMGR key, then the user cannot edit the mail group.

Even if the coordinator is REMOVED from the Mail System, this field remains to indicate who created the Mail Group, if it contains other users. If it is a Personal Group, this field will be deleted.

```
Select AUTHORIZED SENDER: <Enter>
```

Enter a new AUTHORIZED SENDER, if you want. This subfile records user numbers of those users who have the exclusive privilege of addressing the mail group. Messages sent by other users will reach the group only if forwarded by an authorized sender. The authorized senders receive all mail addressed to the group.

WARNING: If a group has authorized senders, then remote users will not be able to send messages to the mail group. Any messages sent by a remote user to a group with authorized senders will be rejected.

```
Select MEMBER GROUP NAME: <Enter>
```

Enter a new MEMBER GROUP, if you want. This is a pointer to another entry in this Mail Group file. See the description of the multiple for more information.

```
Select REMOTE MEMBER: <Enter>
```

Enter new MEMBERS - REMOTE, if you want. This is a free text, validated (at the time you enter it) remote address or local device or local server.

```
Select DISTRIBUTION LIST: <Enter>
```

Enter a new DISTRIBUTION LIST, if you want.

```
Select FAX RECIPIENT: <Enter>
```

Enter a new FAX RECIPIENT, if you want. This is a list of individual recipients who will receive, by fax, any mail sent to this mail group. Original messages only, and not replies, are sent.

```
Select FAX GROUP: <Enter>
```

Enter a new FAX GROUP, if you want. Each member of the fax group will receive by fax any message sent to this mail group. Original messages only, and not replies, are sent.

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